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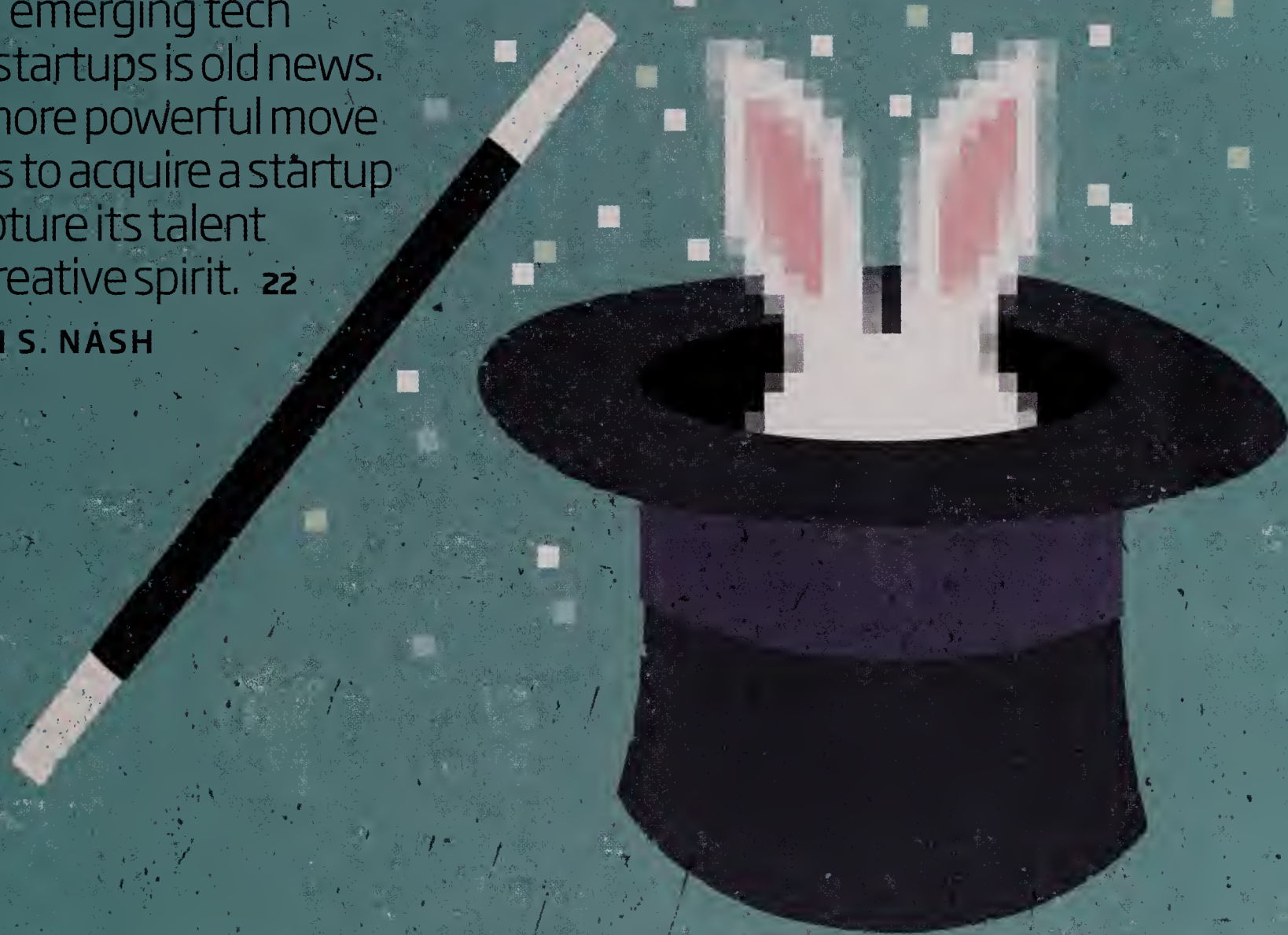
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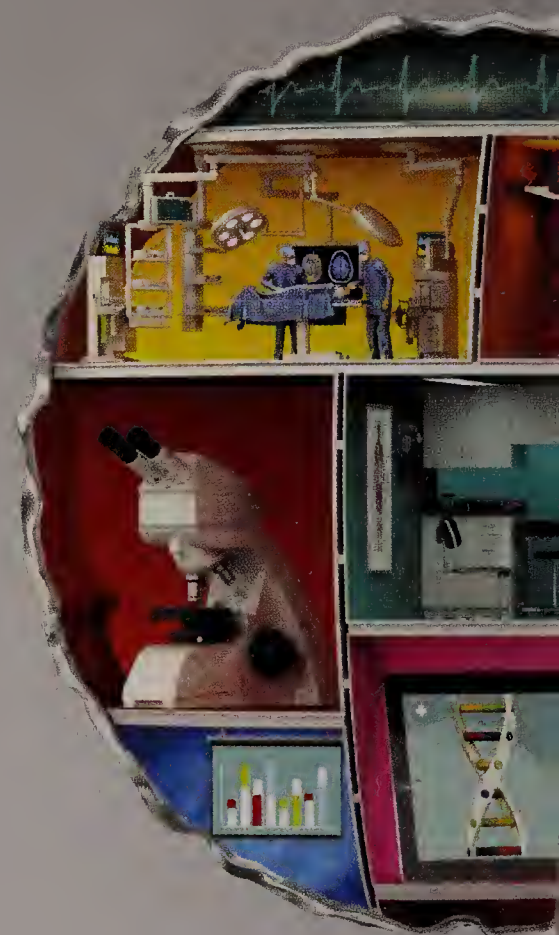
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Instant Innovation 22

COVER STORY Using emerging tech from startups is old news. The more powerful move now is to acquire a startup to capture its talent and creative spirit.

BY KIM S. NASH



When Under Armour acquired mobile app developer MapMyFitness, the startup's founder, **Robin Thurston**, became the parent company's SVP of digital.



FROM THE
EDITOR IN CHIEF

start

Tune In to Startups

A CIO friend of mine is in the market for a particular set of IT skills that his digital marketing firm desperately needs but cannot find. "It's the cloud broker type of skill set—like a cloud architect or orchestration person—someone who can provision out a lot of virtual infrastructure," he said. "The trouble is, they don't exist. You have to make them."

Maybe not.

What if you could buy your way out of an IT talent conundrum like this one—and outrun competitors with some leading-edge technology—by acquiring a digital startup?

That's the question that launched this month's cover story ("Instant Innovation," page 22). Managing Editor Kim S. Nash provides some useful insight into what works (and especially what doesn't) in the risky but exciting business of acquiring talented young companies.

"Aetna, Capital One, Home Depot, Wal-Mart Stores and several other non-IT companies have made such acquisitions recently, pursuing startups for their technology and talent," Nash writes, noting how brisk the acquisition business has been for the past two years (see our chart on page 24).

But if anything ever topped the list of "easier said than done," it's this. Most CIOs aren't even involved in their companies' acquisition plans until the integration preparations begin. "And yet, if you pull it off, you could catapult your company ahead of competitors and boost your own credibility as a digital strategist," Nash points out.

To build up business credibility in this realm, CIOs must start tuning in to the startup world more actively, says former CIO Karla Viglasky, now CIO-in-residence at consultancy Stafford and Associates.

Develop a point of view about where your industry is going, she recommends, and start scouting out emerging tech companies relevant to that direction.

Cultivate relationships with some venture capitalists and seek out events (like IDG's DEMO conference) where you can meet startup founders. Above all, be ready to make the business case with your CEO and C-suite colleagues when you spot something worthwhile.

"When you can prove the tech is going to do something amazing for customers, or in differentiating your [corporate] performance, you have to tell that story," says CIO Chris Laping of Red Robin Gourmet Burgers. "I'm always pitching our CEO."

Maryfran Johnson, Editor in Chief, CIO Magazine & Events
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CHATTER

Wanted: Data Concierge

John Mattison, **chief medical information officer** at Kaiser Permanente, touts the potential for **big data** to improve patient outcomes, but he also warns that without proper governance, interoperability standards and developer platforms, the **flood of medical information** could become unmanageable. He says many data scientists are "**freaked out** about big data" because they're worried about the pitfalls of improperly used data sets. Mattison calls for a new role—a "**data concierge**" who understands data sets in context and can serve as a resource "to **prevent false conclusions** from being drawn."

www.cio.com/article/2851986/

The CMO Needs Help

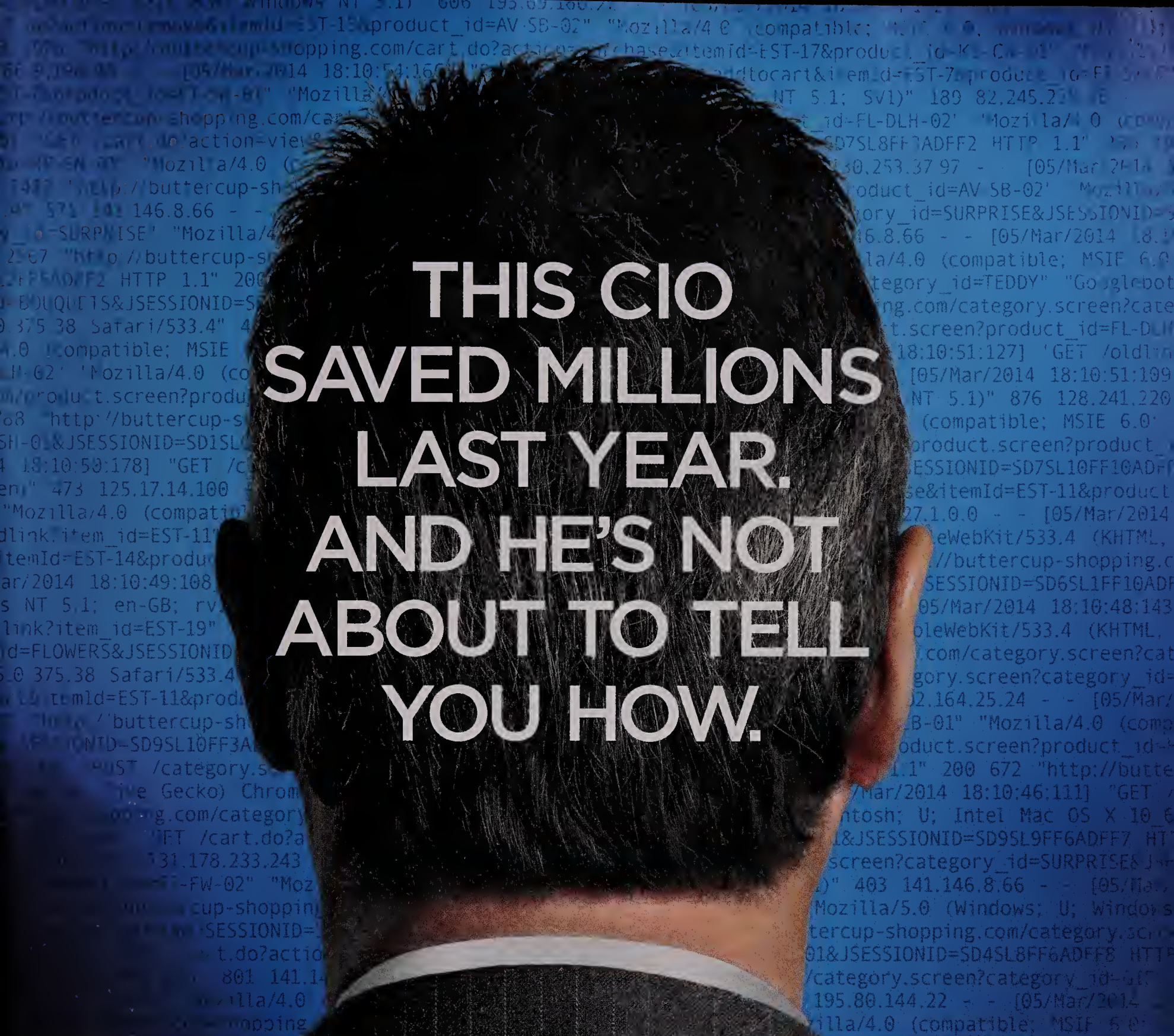
By one conservative count, there are at least 947 vendors selling **software for advertising departments**, and this crowded "**ad tech**" market is ripe for consolidation. The complexity and uncertainty is actually **good news for CIOs**, because the chief marketing officer will need the CIO's help to evaluate the array of vendors and products. "The CIO will have **no shortage of technologies to vet** in the years ahead," says David Berkowitz, CMO at creative agency MRY. Marketers may be commanding larger **tech budgets**, but that doesn't mean they understand the threats and opportunities presented by new software. "CIOs can prove to be **indispensable** by helping marketers understand **what to watch out for**," Berkowitz says.

www.cio.com/article/2855367/

Correction

In the "Bugs Are Not an Option" story in the Dec. 1, 2014, issue, the name of vendor Copper Mobile was misspelled in the second reference. We regret the error.

Have a comment about a story in this issue? Go to www.cio.com/magazine or write to letters@cio.com.



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FROM THE **CEO**

Replace Yourself

I was recently talking with a CIO on the verge of retiring after nearly 20 years, and I asked who would be replacing him. What he said surprised me.

"I don't think they are going to take my recommendation," he said frankly, referring to his endorsement of a senior IT leader. "I wish them the best of luck."

So many organizations talk a good game when it comes to succession planning, but very few actually play it through. I asked this retiring CIO if this was just his personal recommendation or if his company had an internal succession plan in place. He admitted there was no plan, adding that he knew departing executives don't get to pick their successors. Yet he'd been hoping his 20-year track record would make his opinion count for something.

I've heard estimates that fewer than 10 percent of CIOs are succeeded by internal candidates, so this isn't an unusual story. Nor is the problem confined to IT leadership. In a recent Deloitte Consulting global survey of 260 senior business leaders, 52 percent of the respondents said they had no succession plans in place and (even worse) had little confidence that their direct reports would be following them into the C-suite.

With so many succession gaps looming across our enterprise landscape, why are so many companies ignoring their responsibilities? Isn't it time we all took succession planning more seriously? Not only for our own roles, but further down the executive ecosystem, as well. Talent always trumps strategy. Why do we spend so much time mapping out product strategies while blithely ignoring the need to cultivate the talent required to deliver results?

From some of my recent reading, I've identified these three guiding principles to strengthen succession planning:

1. Develop, don't just plan. Provide real growth opportunities and stretch assignments for your high-potential employees.

2. Keep it simple. All succession planning has to do is focus the key development activities. It doesn't need to be complex.

3. Be transparent. Once you've identified potential successors, talk to them about their career objectives. Make sure you're on the same page.

I'd love to hear more from you about how CIOs are stepping up to this challenge. What are you doing to close the succession gap and, when the time comes, replace yourself?

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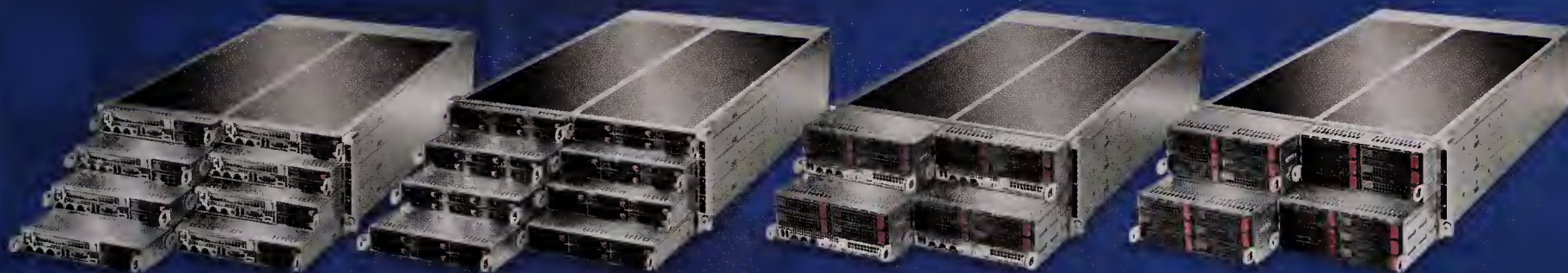
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How to Move Beyond the IT Comfort Zone

Disruption is everywhere we look in IT these days as a storm of social, mobile, analytics and cloud technologies—what research firm IDC calls “the third platform”—batters the walls of traditional IT organizations.

“The business model of IT is changing, too,” said IDC Senior Vice President Meredith Whalen, who spoke at our recent CIO Perspectives Los Angeles event. “In the past, 80 percent of tech spending came from the IT budget. As we move to the third platform, 80 percent will come from business, with IT directing.”

To help your IT group thrive in the future, Whalen recommends taking these steps:

- Move outside your “business process comfort zone.” Focus more IT resources on creating digitally delivered services or IT-enabled products for customers.
 - Revamp the IT workplace to compete for top IT talent. Offer developer “code-athons.” Embrace flextime.
 - Banish shadow IT by delivering faster (or finding a third party who can). Get better at marketing IT services. Communicate in nontechnical, acronym-free language.
- Maryfran Johnson

“IT needs to deliver technology the way the business wants it.”

—MEREDITH WHALEN,
SVP, IDC

PROBLEMSOLVERS

On the impact of empathy:

“Think back in your career to when an executive reached out to you. Those memories stay with you. Create those memories for your staff.”

—Peter Weis, VP of Supply Chain and Global CIO, Motson Navigation

On discussing digital futures:

“[CIOs] are leaders in that. Describe the art of the possible. Tell them a digital story. That will build credibility and influence.”

—Michael Keithley, CIO,
Creative Artists Agency

On giving good feedback:

“I enjoy praise like anybody else, but it’s less important than hearing the criticisms. Getting candid feedback about where to improve—that makes me feel like I’m advancing.”

—Evan Chon, Manager, Web and Mobile Development Group,
NASA Jet Propulsion Laboratory



Jim DiMarzio
CIO, Mazda North American Operations

Driving Digital at Mazda

What does the ‘digital enterprise’ mean in your industry?

Digital in automotive is spanning everything from the vehicle itself and the connected car to the mobile devices consumers are using. It’s pressing us to move faster and give customers more

things on the mobile side. But it’s also internal. We’ve changed a lot that we do with our infrastructure. We’re targeting mobile devices and tablets and trying to move the technology faster.

What IT capabilities are driving Mazda to become a digital enterprise?

The most important thing is the dealerships and what we’re changing there. We’ve got technology in place now with iPads so salespeople can be up to date on products, talk to customers and give them information they wouldn’t normally be able to get. On the service side, training is now [provided with] two-minute videos embedded in a knowledge

base that technicians can search to get information—just like they’d find on YouTube, or from any search engine on the Web.

What technology do you think will make a big impact this year?

The connected car. There’s a lot going on with Google and its platform, and at Apple with CarPlay. It will also give us the ability to have a one-to-one marketing relationship with a customer. We won’t just give them a blanket message that we give to every other customer. We’ll know their driving habits, what they like, what they’re using—and we’ll be able to talk to them individually.

—Louren Brousell

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- nearly 700,000 employees in Haidian, 82% of which have junior college degree or higher.
- The number of students having returned from overseas to China for startups in Haidian accounts for 25% of China.
- Expenses on science research of enterprises above designated size reaches 50 billion, with the R&D investment intensity reaching 4.7%.
- 331 listed (or being listed) companies exist in Haidian, accounting for 10% of that of the whole country.
- The number of patents per annum for each 10,000 head of population in Haidian reaches 135.

In 2013, a total of 53 projects respectively won the State natural science prize, State technical invention prize, prize for State high-tech progress and innovation team prize (general projects), accounting for 21.5% of the total prizes for general projects of China.

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Perks for Passengers

A new reservations system lets Royal Caribbean personalize ticket prices for each customer **BY STEPHANIE OVERBY**

Royal Caribbean Cruises made a splash last fall with the launch of a new ship, *Quantum of the Seas*, which is equipped with tablets for check-in, RFID wristbands for guests, a robotic bartender and a “viewing capsule” that lifts passengers 300 feet above sea level.

The vessel, which Royal Caribbean calls a “smartship,” is intended to wow would-be passengers with an array of onboard technologies. The second-largest cruise line in the world also deployed state-of-the-art IT systems behind the scenes: Fine-tuned pricing software generates personalized discounts, changing the customer’s experience even before boarding.

Royal Caribbean replaced its rigid proprietary reservations software with a more flexible system atop a business rules engine from IBM. “The original reservations system and pricing model was fashioned after the fare codes used by airlines, which ultimately didn’t align well with the more dynamic environment we are in,” says Santiago Abraham, vice president of global business solutions at the \$8 billion cruise line. ▶▶▶

..... **83%** Senior business and technology executives who say they dislike the term “big data” or find it overstated. NewVantage Partners, 2014 survey

Royal Caribbean can now get more creative with its offers. For example, it can launch campaigns on the fly if a particular voyage isn't selling well, or enable customers to use all of the offers for which they qualify. In the past, starting a new promotion took weeks, because IT had to build systems to support it. And there was no automated way for customers to combine all their personal discounts—say, one for being member of the Crown & Anchor loyalty program, another for being a senior and yet another for being a resident of Florida. Cruisers had to call Royal Caribbean for workarounds. "It was difficult for a guest to decipher the best price we could give," says Abraham.

Now customers automatically get the best offer based on which discounts can be combined, he says. And that makes for a much improved customer experience.

"This makes sense for cruise lines, especially if they are sending these targeted offers to their existing customers," says Mark Ferguson, a management professor at the University of South Carolina. Cruise lines typically collect and keep more data about customers than airlines or hotels do, because they track onboard spending habits over the entire trip, he says. Offering a discounted base price to a customer known to spend a lot of money on extras aboard ship is likely to be more profitable than offering discounts to everyone based on a simpler trigger, such as the timing of when a ticket is purchased, he says. Royal Caribbean is known for courting repeat customers. The company says that as many as 50 percent of the people on a cruise are repeat passengers.

"We can get much more dynamic because it's all built into the system," Abraham says. Revenue analysts and marketers can create and launch promotions in hours, as they did with the 123Go! campaign, through which passengers on Royal Caribbean's Celebrity Cruises can choose one of three perks: free beverages, covered gratuities or an onboard credit. That program is expected to have paid for itself by the end of this year.

Stephanie Overby is a freelance writer based in Massachusetts.

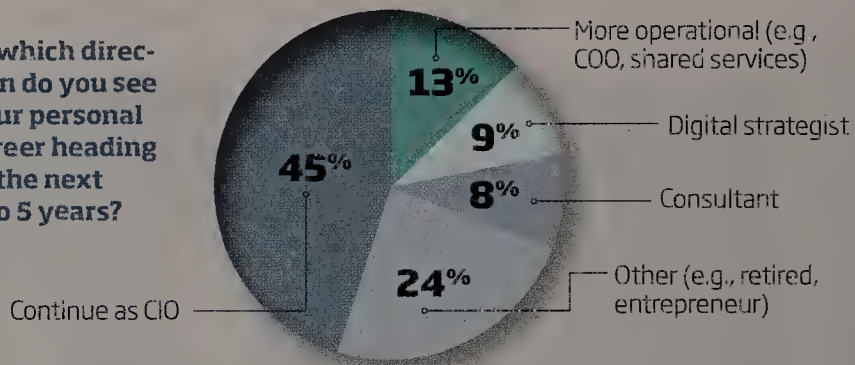
"It was difficult for a guest to decipher the best price we could give."

—Santiago Abraham, VP of Global Business Solutions, Royal Caribbean

YOUR CAREER PATH: More of the Same

Only 9% of CIOs expect to become customer-facing "digital strategists," such as chief digital officers, in the next few years

In which direction do you see your personal career heading in the next 3 to 5 years?



SOURCE: CIO Magazine's State of the CIO 2015 survey of 558 IT chiefs. NOTE: Percentages don't add up to 100 because of rounding.

QVC Gains Sales Boost From Tablets

Home shopping channel QVC recently launched a feature in its tablet app called **Second Screen**, which acts as a companion to the network's TV programs. With the app, tablet users can see more info about products, check out videos, view customer ratings and more. The content dynamically changes as the show goes on.

The initial sales results? "We've seen our conversion in that app go up by 200 basis points," says QVC CIO Linda Dillman. The app, part of QVC's omnichannel retail strategy, enhances the customer experience, she says.

The app's spike in sales conversions makes sense, because QVC consumers are probably using their tablets while watching TV.

A 2014 Nielsen survey found that 84 percent of smartphone and tablet owners use their devices as second screens.

For the next release of **Second Screen**, Dillman says that QVC plans to add Facebook, Twitter and Instagram features so consumers can connect with each other socially. Given QVC's expertise in video creation, Dillman is also looking at other ways to offer consumers more video.

—Tom Kaneshige

..... **19%** U.S. CIOs who plan to hire additional IT staffers in the first six months of 2015, up five percentage points from 2014. Robert Half Technology

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Leaping Into a Director's Chair

Boards want your tech expertise, but as a director you'll need to learn how to ask the right questions about IT strategy and risk **BY ADAM HARTUNG**

Boards of directors today are asking lots of questions: Can costly IT infrastructure be replaced by cloud-based systems? Can cheap apps replace expensive software? Which is better for business—Android or iOS? Cybersecurity: What's our risk? And what's our solution?

Information technology is now a board priority. Discussions of IT were once relegated to uncomfortable sessions where directors nodded off, chafed at random acronym attacks and struggled to tie the technology budget to anything good for the company. But no longer. Now boards have very serious worries. They don't want their company to be the next Target or JPMorgan Chase, and they're wondering how in the world such big problems could emerge from IT. Nobody wants to be out-of-date using BlackBerries while competitors use iPhones, or using cash registers while competitors check out shoppers on tablets or smartphones.

Increasingly, companies are seeking tech expertise on the board, not just hoping to absorb knowledge from management presentations. Asking the CIO questions is a waste of time if the questions aren't very good. If nobody on the board knows how to formulate the right questions, directors won't get the answers they need.

Sought-After CIOs

So there's a real demand for CIOs to serve on boards, and many companies are seeking IT leaders who are qualified candidates. Would you be prepared if a company asked you to serve on its board?

The key is to understand that there's a big difference between being a good CIO and being a valuable board director. A good CIO's job is to do things right: budgeting, implementing, advising the CEO, executing. But a board director's role is very different: It's figuring out whether the company's executives, including the CIO, are doing the right things. Are they asking themselves the right ques-

tions? Are they investigating all the right options? Do they have the right processes in place to make good decisions? Are they fulfilling compliance requirements *and* innovating for future growth? Do they have contingency plans, and are those plans adequate? Are they meeting customer technology requirements? Are they vigorously managing tech vendors? Is the money spent on IT making the company more competitive? Is IT creating advantage? Is management anticipating game-changing technology, experimenting with it and preparing to use it? Is the CIO keeping an eye out for disruptive technology and competition from the fringes? Are IT's processes capable of sensing market changes, and is IT preparing for technology shifts?

In addition, a CIO who becomes a board director must help fellow directors understand critical IT issues, and help them get comfortable asking their own questions. You aren't a consultant, but you are their coach regarding technology, and part of the team. You are expected to contribute on all aspects of corporate governance and help *all board members* feel as though they know the critical IT questions, understand management's answers and grasp the business implications.

In many ways, being on a board is the flip side of being a great CIO. A board director will grill the CEO and the CIO about whether they have the right technology strategy. It's a role reversal that not many people make easily, because most C-level executives are experts at execution, but not necessarily experts at governance.

Even if you aren't currently being pursued to fill a board seat, understanding the different roles should help you be better prepared for making board presentations. If nothing else, you'll understand why you're being peppered with all of those questions.

Adam Hartung is a speaker, author, member of the board of a public company (Six Dimensions Global), and fellow of the National Association of Corporate Directors.

There's a real demand for CIOs to serve on boards, and many companies are seeking candidates.



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Flying Tablets

A utility company sends helicopter patrols up with iPads to spot and track electricity hazards **BY LAUREN BROUSELL**

At LG&E and KU Energy, a utility that serves 1.2 million customers in Virginia and Kentucky, patrollers spend 120 days a year in helicopters looking for problems that might cause power outages. Line damage, overgrown vegetation or other problems along the 5,500 miles of transmission lines in the company's territories must be identified to avoid leaving customers in the cold and dark.

During high-speed flyovers in vibrating helicopters, patrollers used to write observations in notebooks and mark locations on paper maps. Then they'd have to try to decipher the squiggles back at the office, says Joan Ferch, director of IT development and support at LG&E and KU Energy.

Now the \$2.2 billion utility uses an iPad application it built for in-flight surveys. During the design process, Ferch says, a project manager, business analysts and developers did fly-alongs, to better understand what kind of features on the user interface would work best for pilots ▶▶▶

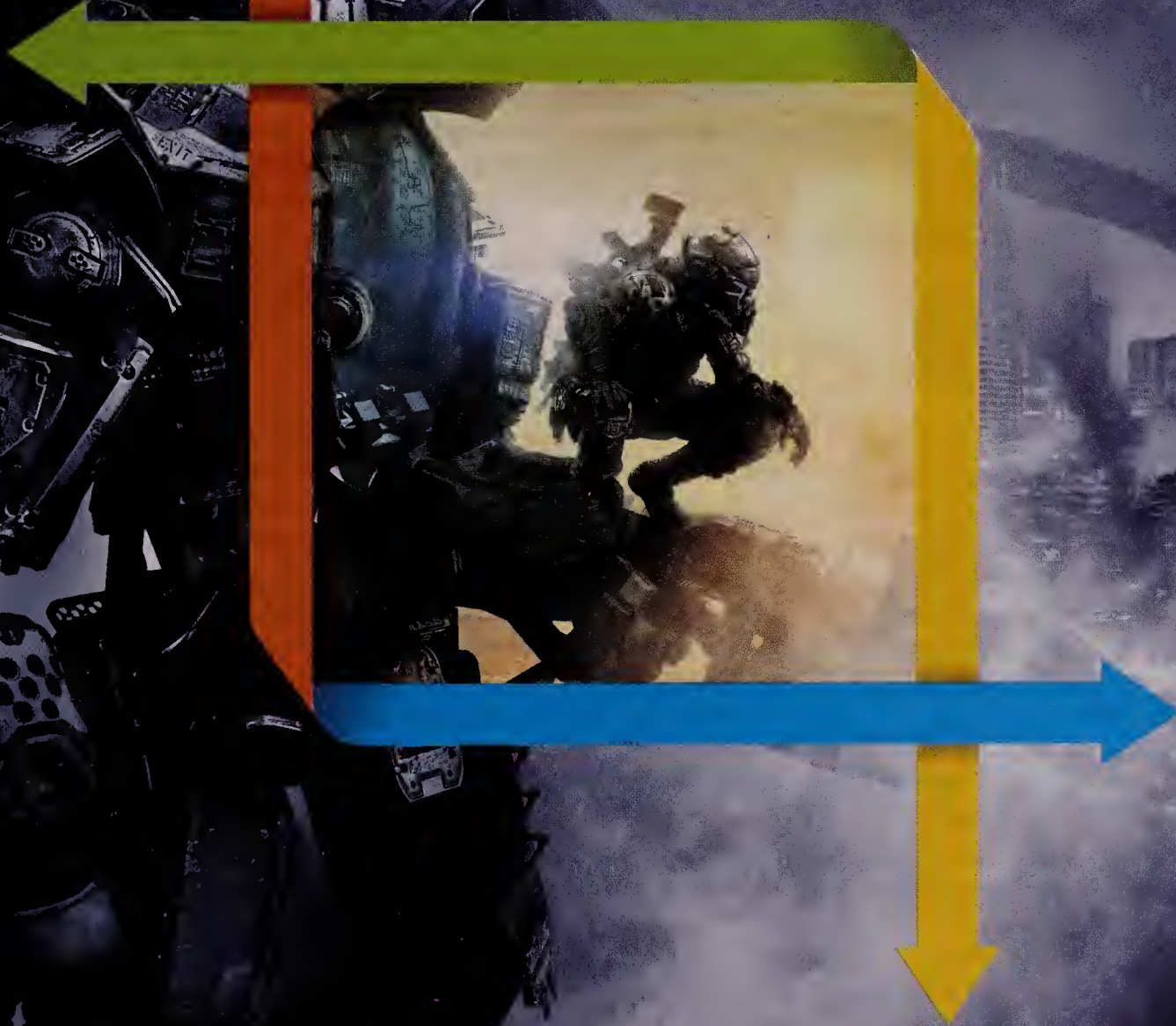


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►►► **Flying Tablets** Continued from page 16

and co-pilots on the move. They wanted to build in stability and ease of use.

To use the new system, the co-pilot straps an iPad to his thigh and taps and types to record what he's seeing on digital maps with an overlay of transmission facility locations. To note problems such as woodpecker holes, deer stands or overgrown trees, he can choose from a selection of codes listed along the side of the screen. As transmission issues are logged from the helicopter via local cellular networks, operations teams on the ground can view the information in real time and take action. If conditions get choppy, the crew members can record voice comments, hands-free. The data is saved locally in case the connection fizzles, says Jim Lepianka, manager of .Net and mobile applications development at the utility.

After landing, patrollers upload their notes to a database. The act of syncing the data automatically generates any necessary work orders, Lepianka says.

"The specificity and accuracy is way better than manual input," says Marcus Torchia, an analyst at IDC. "It reduces mistakes, and there's a great amount of efficiency gained."

Avoiding Danger

The application can display details about past problems, such as equipment damage, that could put a helicopter in danger within a 1,600-foot geo-fenced area—a feature built after a "tragic helicopter accident," Ferch says. Patrollers hear audio warnings from the app, and they see visual cues on-screen. They can then inspect the areas to determine whether prior repair orders have been carried out.

The whole process is more accurate now, especially the in-air notations. "[Reports don't] have to be transcribed from notes that you can't read when you get back down to the ground," Ferch says. In addition to making it possible to identify problems more quickly, the application is expected to reduce expensive flight time by 10 percent per year because the electronic process is more efficient than using paper and pencil. That means the utility could eliminate about 12 of its typical 120 flying days per year.

LG&E and KU Energy is exploring the idea of applying for a patent on the system. And Lepianka says other utilities, including parent company PPL, have expressed interest in using it.

Contact Senior Writer Lauren Brousell at lbrousell@cio.com. Follow her on Twitter: [@LBrousell](https://twitter.com/LBrousell).

Facebook Plans to Enter Crowded Business Market

BY MATT KAPKO AND LOEK ESSERS

Most people don't want to be caught at work with Facebook open on their computers or smartphones, but that may change. Facebook is working on a new social network for the workplace. Called Facebook at Work, the new platform would pit the king of social media against more business-savvy vendors such as Google, Microsoft and LinkedIn.

Facebook's new network, which is in early-stage testing, will be designed to let employees collaborate in groups and via messaging and a news feed, according to a person familiar with it, who added that information from Facebook at Work won't show up in users' personal accounts. (Facebook declined to comment.)

The product's success may rest on whether Facebook can convince CIOs and IT professionals that it is secure, private and non-intrusive.

Enterprise social networks that would compete with Facebook's offering include Jive, Huddle, Microsoft's Yammer, Salesforce.com's Chatter, IBM Connections and Cisco's Jabber.

Reaction Shots: Facebook is late to the collaboration table, and its network could prove to be just one more workday distraction, analysts say.

"Facebook is moving into a very crowded space," says Andre Spicer, a professor of organizational behavior at the Cass Business School in London. And generally speaking, he adds, "using Facebook is not going to make people more productive at work; it will probably actually divert from [work] activity."

Security is another issue in the business market. "It does create potential security leak problems externally, but more importantly internally," Spicer says. For example, it will be harder to make sure that a certain piece of news is not exchanged between departments. Plus, some companies might not want to host business conversations and documents on Facebook's servers.

Still, it could be valuable for companies that have a lot of virtual teams, such as consultants or salespeople.

"Facebook certainly has a familiar user experience that people love, and it could blur the lines between employees and customers in a compelling way," says Forrester Research analyst Rob Koplowitz. "They have the ability to drive enterprises toward new levels of customer activation." But, he adds: "To fully compete in the enterprise requires deep and complex capabilities that aren't required in a consumer offering. It can also be a tough, low-margin business."

Matt Kapko is a senior writer for CIO.com, covering social media. Loek Essers is a correspondent for the IDG News Service.

VIEWPOINT

**Anthony Christie**

CHIEF MARKETING OFFICER
LEVEL 3 COMMUNICATIONS

Anthony Christie is chief marketing officer for Level 3 Communications, responsible for worldwide marketing, product management and customer experience. He oversees go-to-market strategy, product management, strategic pricing, corporate marketing and coordination of the regional marketing organizations.

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Solid network strategy delivers productivity gains, better customer experience

CIOs and IT leaders are under more pressure than ever to serve their organizations as business strategists. They are expected to deliver innovation, increased productivity, reduced cost and a better customer experience while maintaining security and reliability. How does the network of today fit into this equation?

Success is predicated on the right approach to network strategy – an important tool in an IT leader's arsenal. A solid network strategy will help IT leaders to manage

People used to think of the network as plumbing, but today's network is better described as a strategic asset. How do we shift perception in the IT community regarding the network's role in business success and delivering a positive customer experience?

As an IT leader, you know the old "network-as-a-pipe" view no longer applies. But as a strategic business enabler, a good network partner can provide guidance and vision to

We believe the network is the heart of the business, and that it is not merely a passive asset for moving data, but an active resource for delivering business solutions and customer experience.

IT fundamentals and deliver value to the business through innovation, increased productivity, secured data and reduced costs while delivering a positive customer experience.

As businesses and IT departments work to keep up with social networks, mobile devices, data analytics and the cloud, customer experience can be impacted. How does the network factor into the overall business success and positive customer experience?

We think it starts and ends with the network.

Having the right network infrastructure helps to give businesses an extensible platform to enable smooth, secure and cost-effective deployment of multiple technologies and business solutions while activating initiatives for improved customer experience. As applications continue to move to the cloud, and demand for increased performance and mobile device usage grow, network infrastructure should be designed and modified to address these challenges.

enhance your approach to your network strategy.

We believe the network is the heart of the business, and that it is not merely a passive asset for moving data, but an active resource for delivering business solutions and customer experience.

A business needs to focus on its customers. How can a company ensure that valuable resources are not taken away from its core business to manage network issues?

Customers want fast, reliable, secure access to their data. This requires identifying and deploying new and more effective ways for CIOs to deliver, without undo "friction" to time, cost or experience.

Whether that means connecting to the cloud or implementing a fully managed network, when you work with a reputable network services provider, that provider will be able to design a network solution that helps to solve your problems, so you can focus on what matters most – your customers. ■

What NOT to Put in the Public Cloud

Giants in the Cloud: An IDG special report finds that IT chiefs at big corporations are in no rush to put ERP or proprietary data in external clouds **BY ANN BEDNARZ**

In interviews with CIOs at 16 large enterprises, we found that cloud adoption varies from simple experimentation to heavy use of hosted apps and infrastructure in public and private clouds. Yet even among the most cloud-friendly businesses, there are some resources that CIOs won't consider migrating to the cloud—at least not yet.

Certain tactical capabilities can easily be acquired in the public cloud, but not everything falls into that category. Some enterprise systems aren't ready to be run off-premises because of safety and reliability concerns, says Joe Spagnoletti, CIO at Campbell Soup.

Spagnoletti emphasizes that Campbell's is not trying to do everything in the cloud. The company's cloud projects are "highly targeted to the things we're trying to change; double-entry bookkeeping hasn't changed for a long time," he says.

At Dow Chemical, IT has built a cloud-based infrastructure that includes systems hosted by vendors as well as its own private cloud. On the software side, while the majority of Dow's applications are in a cloud environment, only about 10 percent are in the public cloud. Looking ahead, about 30 percent to 40 percent of applications are expected to be in the public cloud within three years, says Paula Tolliver, CIO and corporate vice president, business services.

Dow's private cloud delivers a lot of the benefits of cloud computing, and it positions the company for future public cloud migrations. As Dow weighs future investments, it starts with a pro-cloud mindset. But what likely won't go to the cloud? ERP. Dow doesn't have any plans to move its core SAP systems to the cloud. Doing that

would mean major upheaval. "What's the financial incentive for us to go?" Tolliver asks.

Family Dollar is another company that isn't rushing to move its core business systems to the cloud.

The discount retailer runs a variety of systems on cloud setups, including HR applications, SharePoint and its FamilyDollar.com website. In

broader move to the public cloud.

Progressive today relies on the cloud mainly for software applications that aren't core to running the business, says CIO Ray Voelker, who adds that he's in no rush to move data into the public cloud. "Given the highly regulated industry within which we operate, we need to keep our data private," he says.

The systems that lend themselves to cloud need to be used most of the day, don't have batch processing cycles, and aren't very data-intensive.

general, the systems that lend themselves to the cloud are those that are used most of the day, don't have batch processing cycles and aren't very data-intensive, says CIO Josh Jewett.

Most of Family Dollar's core IT infrastructure resides on-premises. ERP and data warehousing, for example, are kept internal largely because so much data runs through those systems that "there isn't a good business case" for constantly passing it in and out of the company's network, Jewett says. "You have to move it through a skinny pipe," he explains. "That takes a lot of time, and partners may charge by the megabyte or terabyte. If you're talking about close to a petabyte of data, not only is it hard to move but it's cheaper to keep it on-premises."

Jewett doesn't anticipate having to do a major upgrade of his ERP system for a few years. He'll revisit its cloud potential at that time.

Legacy investments are also keeping Progressive Insurance from a

Similarly, Western Union has selectively deployed cloud apps, such as Salesforce and Workday. "We've made some reasonably safe bets with vendors who are recognized leaders," says Sanjay Saraf, CTO at the financial services company.

But Western Union is wary of moving too fast into the public cloud because it must comply with hundreds of local, national and international financial regulations covering money transfers, Saraf says.

For analytics, Western Union wanted to ramp up quickly on Hadoop last year and tested some scenarios with major cloud services. Ultimately, though, the company decided to keep analytics in-house. "Data is so core to what we're about, we decided to bring it in," Saraf says.

Based on interviews by IDG Enterprise journalists Johanna Ambrosio, Brandon Butler, Brian Eastwood and Kim S. Nash. Read the full report: www.cio.com/article/2826675/

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23

Using emerging tech from startups is old news. The more powerful move now is to acquire a startup to capture its talent and creative spirit. **BY KIM S. NASH**

*M*aybe it's time to buy a startup. You have a mandate to innovate as you transform your company to a digital enterprise, whatever that entails. Yet 74 percent of CIOs find it challenging to balance business innovation and operational excellence, according to our 2015 State of the CIO research. Maybe an injection of entrepreneurs and their inventive new technology can help.

You may also be having trouble finding talent in analytics, mobile development and social media. This year will bring shortages of those key skills, our research finds. Buy a startup, though, and you get a whole team instantly. Even some of those brilliant "data scientists" you've read about. Problem solved, perhaps.

Aetna, Capital One, Home Depot, Wal-Mart Stores and several other non-IT companies have made such acquisitions recently, pursuing startups for their technology and talent. That type of activity has been especially brisk for the past two years (see chart, page 24). And there's no slowdown in sight. In the insurance industry, for example, 59 percent of companies are expected to buy digital startups in the next three years, according to a survey by Accenture.

Chris Laping, CIO and senior vice president of business transformation at Red Robin Gourmet Burgers, keeps up with new technology and says he is always open to the idea of buying a startup. "You look at ideas they have and think, 'Man, it would be great to have this exclusively ours; we would get such competitive advantage if we were to buy that,'" he says.

However, Laping is in the minority. Not many CIOs are involved in these transactions. Finding, vetting, acquiring and integrating a small company of out-of-the-box

When Under Armour acquired mobile app developer MapMy-Fitness, the startup's founder, **Robin Thurston**, became the parent company's SVP of digital.

thinkers is harder than you know. You probably can't do it, at least not without upending many of the expectations your C-level peers have about the CIO. And about half of startup acquisition deals fail, says John Sullivan, a management professor at San Francisco State University who studies innovation and people management. Often key talent leaves or the technology goes nowhere. "It's hard for a large nontechnology company to recruit tech talent," he says. "Doing this is even harder."

And yet, if you pull it off, you could catapult your company ahead of competitors and boost your own credibility as a digital strategist. Ready for the risk?

Build Cred

There are many ways to tap into the startup world for an infusion of innovation. Options include holding competitions for great ideas, investing seed money, forming partnerships and creating incubators. In 2013, the giant U.K. supermarket Tesco set up an investment unit, Dunnhumby Ventures, to incubate fledgling tech companies. Tesco benefits by, for example, getting to try out new wearable technology to make warehouses more

efficient. Other Dunnhumby clients include Coca-Cola, Pepsico, Kraft, T-Mobile and L'Oreal. BNY Mellon recently opened a Silicon Valley office to focus on innovation. So did AstraZeneca. By making such moves, non-IT companies gain access to brand new technology and entrepreneurial talent while stopping short of buying startups outright.

Typical IT budget models—with little unallocated capital and even less capacity for risk—don't allow CIOs to wheel and deal to acquire companies on their own, says Mark Raskino, an analyst at Gartner. Even buying a tiny one- or two-person company is out of the question. Marketing groups and business units usually have more play in their budgets and can more easily fund acquisitions, he says.

For IT to initiate a deal, the CIO must bring the idea to the CFO, COO or CEO. Perhaps even to the chief digital officer. But fellow executives might be cool to a proposal from someone inexperienced in M&A, Raskino says. Some CIOs lack business savvy. Some are viewed as better service providers than business partners. "Not many CIOs are that externally facing," he says.

Some, such as Land O'Lakes CIO Mike Macrie, do have

NEW INNOVATION STRATEGY

Buying Startups for Tech and Talent

Non-IT companies trying to build capabilities in the digital realm are increasingly using a weapon wielded in the IT industry: acquisition. Apple, Cisco, Facebook, Google and Microsoft are all masters of acquiring startups for their technology or their people. Now banks, media companies, retailers and others are giving it a go. Here's a sampling:

Buyer	Target	Technology	Year	Price
Aetna	Bswift	Online health exchange	2014	\$400 million
Amazon.com	Goodreads	Social network for readers	2013	Not available
Capital One	Adaptive Path	Customer experience	2014	Not available
Equifax	TDX Group	Debt collections software	2014	\$327 million
	Forseva	Debt collections software	2014	Not available
Home Depot	BlackLocus	Analytics	2012	Not available
	Redbeacon	Online marketplace	2011	Not available
Intuit	Check Inc.	Mobile bill payment	2014	\$369 million
	Demandforce	Online marketing	2014	\$449 million
PetSmart	Pet360	E-commerce, social network for pet care	2014	\$130 million
Under Armour	MapMyFitness	Mobile apps	2013	\$150 million
Wal-Mart Stores	Luvocracy	Social network for shoppers	2014	Not available
	Inkiru	Analytics	2013	Not available
	Stylr	Mobile app	2014	Not available



CIOs need to tune in to the world of startups and venture capital, but it can be overwhelming, says **Karla Viglasky**, CIO-in-residence at Stafford and Associates.

extensive experience with mergers and acquisitions. Macrie even hired an IT executive to help with such deals, including the purchase of an analytics company in 2012. But M&A know-how isn't as widespread in the CIO profession as it is in others.

Politically, it's shrewd for a CIO to get involved. One reason: Boards of directors may come to expect it, Raskino says. In the past few years, corporate boards have awakened to the importance of IT, he says, and are now more open to technology acquisitions, especially if the company lags in online or mobile capabilities.

For example, PetSmart last year bought Pet360, an online pet supply store and social network, for its e-commerce and digital capabilities. PetSmart ran its own e-commerce site but it has been small potatoes, accounting for just 1 percent of the retailer's \$1.7 billion in sales for the most recent quarter. Pet360, meanwhile, runs two e-commerce sites and six content sites that cater to different types of consumers.

As CEO David Lenhardt told financial analysts last summer, "This transaction is a smart and efficient way to immediately position PetSmart as a leading online pet specialty retailer of food and supply." Pet360, he said, brings "significant online and technology experience."

The CEOs of these acquired businesses frequently gain influential positions at the parent company. For example, Pet360's CEO became PetSmart's chief digital officer and now oversees all of the company's online and mobile marketing and products. Also last year, \$2.3 billion athletic clothing company Under Armour bought MapMyFitness, a mobile app vendor, and immediately appointed the startup's founder, Robin Thurston, to be the parent company's senior vice president, connected fitness and digital.

Under Armour had a CIO, but the IT team was focused mainly on internal operations, according to Thurston. "There was a gap

in what the needs were in the leadership of digital," he says.

Under Armour CIO Chris Gates says his group focuses on consumer experience through point-of-sale and e-commerce systems. The acquisition of MapMyFitness "now opens up career paths," Gates says. "Both of our teams are excited."

Wise Up

To tune in to the startup world, CIOs will need to change their habits and get involved in conversations that could lead to transactions, says Karla Viglasky, CIO-in-residence at Stafford and Associates, a consulting firm that connects CIOs with emerging technology providers.

Staying ahead of your rivals is just the start. Better still is to develop a point of view about not only where your industry is going, but also where you can push it, says Viglasky, who is also a former CIO of ITT. As companies tackle digital transformation, CIOs will be expected to scout the future this way, she says.

But sifting through thousands of startups is time-consuming, she says, remembering her attempts when she was at ITT. "When I reached out, some were ready and some were not," she recalls. "I didn't have the time to waste finding that needle."

CIOs have to mix in different circles. You should get to know venture capitalists, for example, or attend conferences and speed-dating sessions with startups. And make sure you're listed on the corporate website, so startups and VCs can find you, Viglasky says.

Laping, the CIO at Red Robin, enlists help. He works with a consultancy, Trace3, which introduces him to young companies looking for customers and investors. Red Robin hasn't bought any startups yet, but Laping would make an internal pitch if it made financial and technological sense, he says. Meanwhile, he's using the cloud and social technologies of several new ventures.

"You look at ideas they have and think, 'Man, it would be great to have this exclusively ours.'"

—Chris Laping, SVP of business transformation and CIO,
Red Robin Gourmet Burgers

Two years ago, Laping informally proposed a buying a stake in an international retail point-of-sale software company whose analytics and integration capabilities he loved. He and Red Robin's president and COO approached the vendor's founders and were turned down. But Laping isn't deterred. "I'm always pitching our CEO," he says.

Making the right business case is critical. You're buying a small, young company without a big market share and often without much of a customer base. You won't see financial results immediately. Still, saying simply that the target will be useful won't cut it either. You license useful technology all the time. It's got to be a killer case where taking the target off the market might, for example, prevent competitors from getting access to strategic technology, Raskino advises. Or where buy-

ing the company blasts your own way ahead or into a dazzling new business. Right time, right technology, right people.

"When you can prove the tech is going to do something amazing for customers or in differentiating your [corporate] performance, you have to tell that story," Laping says. Sometimes the payback period might be five or 10 years and the CEO must be convinced, he says.

To build a great case, a CIO must first understand the returns on other investments the company makes. At Red Robin, for example, the point at which opening a new restaurant starts to generate profit is an internal rate of return of 12 percent. If Laping can show that acquiring a company and using its technology can generate returns of, say, 30 percent, why wouldn't Red Robin consider it? Investors expect Red Robin to do the smartest thing it can with money on hand. "What's important for the CIO is to put a [forecast] on the table that dwarfs the typical return the company gets for a typical use of its cash," he says.

Fight the Failure Odds

Once an acquisition closes, integration work begins. Beware: Some entrepreneurs view getting bought as selling out. A big bonus may keep people in the fold, but it won't keep them excited, Sullivan says. The peer pressure, along with an itch to create a new company, can be hard to manage. "You feel like an outcast. Your friends won't talk to you," he says.

Enterprise IT has a bad reputation for bureaucracy, with lots of rules for processes that, at a startup, are pretty fluid, such as who can touch which code when and how to requisition a new server. As a young coder used to working all night on open source or in the cloud, "it frustrates you and blows your innovation," Sullivan says. "Run fast and break things" used to be Facebook's slogan," he notes. "I can't imagine a bank saying that."

As Raskino observes, "it's easy for a company to buy something and crush it."

CIOs can help avoid smothering the creativity that made the acquisition attractive. There's financial and moral support to bestow. PetSmart spent \$130 million to buy Pet360 and expects to spend another \$30 million in "performance-based payments" to Pet360 staff by the end of 2016.

Keep teams together and treat the leader—and the staff—well, advises Sullivan. For example, Wal-Mart's practice when it buys a tech startup is to install the new team in its @Walmart-Labs office in Silicon Valley, where they are charged with building the future of e-commerce and work alongside others from previous acquisitions. Many of the founders of the 15 companies Wal-Mart has bought in the past five years remain with @WalmartLabs as software engineers or senior executives.

Most non-IT companies won't do tons of deals but can learn from IT vendors that have, Sullivan says.

For example, Cisco, which has bought 36 companies since 2010, is "scientific" about M&A activity, he says. The networking vendor has formalized its acquisition processes and teaches it to other companies. One rule of thumb: If the CEO of the new company doesn't stay at least a year, the acquisition won't bear fruit because the team will feel adrift, says Sullivan, who has studied Cisco's processes. Also, the acquiree's office should be no more than 100 miles from its new parent's headquarters,

“It’s easy for a company to buy something and crush it.”

—Mark Raskino, analyst, Gartner

to foster integration without hovering. Communication matters, too. Cisco runs a secure website where newly acquired employees can learn about the company and see updates about how their particular integration is going.

One helpful technique is to keep acquired companies in separate offices, retain their existing leadership and set special performance goals. Aetna has done this with Bswift, which sells technology for building online health insurance exchanges. Capital One also did it with its user experience acquisition, Adaptive Path.

In 2012, Home Depot bought BlackLocus, a small pricing analytics company started by three Carnegie Mellon graduate students in 2009. The BlackLocus team has become Home Depot’s official innovation lab in Austin, Texas, providing analysis that the retailer uses in merchandising decisions.

Startup employees want to know their inventions are being used and they want to continue contributing, says Thurston of MapMyFitness. Under Armour, he says, has done it right.

MapMyFitness was founded with a mission to build a social network of fitness enthusiasts through mobile apps that track progress in running and other activities. Thurston met Under Armour CEO Kevin Plank in early 2013, just as MapMyFitness was evaluating whether to raise more capital through venture funding or to find another kind of investment partner. Plank was a user of the MapMyRun app and saw potential in a partnership. The \$150 million acquisition closed in late 2013.

Had the two met a year earlier or a year later, the deal probably wouldn’t have happened, Thurston says. Earlier, he was too focused on independent growth, and later he might have been on track to go public. “We were at a pivotal moment,” he says.

While Under Armour had focused on the top echelon of athletes, such as Olympians and other elite performers, MapMyFitness focused on regular people trying to get healthier and feel better, 20 million of whom used its apps to track their progress and connect with one another. “The core mission of UA is to make athletes better,” Thurston says, “but they recognized that you have to make more athletes.”

Members of Thurston’s team wondered where they would fit in and what it would mean to go from having equity in a private company to being an employee of a big public company. Thurston, too, was wary. He had worked in a research group at Reuters for several years, where he was involved in a dozen acquisitions. From a people perspective, “none went well,” with unclear roles and lots of acquired professionals let go, he says. “It was incredibly painful.”

The Under Armour deal, however, went well. There was little staff overlap because Under Armour didn’t have much consumer-facing digital technology at the time. “That helped our team feel that UA was truly investing in us,” rather than taking their technology and maybe planning to disregard the people, he says. “We were allowed to continue our vision on a bigger stage.”

Under Armour also assigned an internal IT staff member to the MapMyFitness staff, to make sure the newcomers had the technology they wanted, quickly. That’s an effective technique for avoiding alienation, Viglasky says. Otherwise, people coming from an agile, fast-moving startup to a bigger place with established processes can easily feel stymied, she says.

When the deal was completed, Under Armour valued MapMyFitness technology at \$12 million and its customer relationships at \$3.6 million. On top of that, it expects that further technology development and cultivation of a community of athletes is worth more than \$122 million. The idea is to compete with Nike and Adidas, which have built their own apps and wearable devices. The roster of MapMyFitness users has since grown to 31 million.

Nearly all of the original staff members remain. They recently moved to a brand new Austin office, with spin bikes in the conference rooms and a bank of treadmills that overlook Lake Austin. “The change is exciting,” Thurston says.

Don’t Expect Immediate Results

On the flip side, a corporate CIO should watch for a drop in morale among existing IT staff members after acquiring a startup, Raskino says. They might grumble that they could have come up with that cool algorithm or that innovative idea if they had been given the time and money to experiment. But buying startups can eventually infuse the acquirer with entrepreneurial drive, as Wal-Mart CIO Karen Terrell noted at a Silicon Valley conference in 2012: “It changes companies over time. It’s changed Wal-Mart an awful lot.” (Terrell didn’t respond to requests for an interview for this story.)

Of course, a payoff isn’t guaranteed. Even IT vendors with long track records of dozens of acquisitions don’t get it right a significant portion of the time, Raskino says. CIOs know too well that when a big vendor gobbles up a smaller player, sometimes it disappears completely and customers are left wondering whatever happened to that technology, he says.

Sometimes, it takes years to see results. Wal-Mart has been at it since 2010 and is still in test mode with many ideas. In 2011, Home Depot bought Redbeacon, an online service founded by three former Google employees that helps consumers find local contractors. Redbeacon has grown since, but it’s no powerhouse. Pet360 accounts for less than 6 percent of PetSmart’s overall revenue, and it remains to be seen how much it will contribute.

But Laping, for one, is convinced that payback will come, with creativity and fortitude—and a strong relationship with the CEO. “He’s willing to listen to every idea that comes to mind. I’m good for 30 ideas a week and maybe one will pop,” Laping says. “I don’t have fear about approaching him with a wild idea.” **CIO**

Contact Managing Editor Kim S. Nash at knash@cio.com. Follow her on Twitter: [@knash99](https://twitter.com/knash99).

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SOUNDING BOARD

Jive, Yammer or Tweet?

These CIOs foster a social enterprise with tool choices, rewards and executive support

ROBERT FECTEAU, SAIC

MIX THE PERSONAL AND PROFESSIONAL

We have top-down support for a variety of collaboration tools from our leadership, and each has a different level of promotion and acceptance among the workforce. We often see a groundswell of use among younger employees who want various collaboration services, and we have a communications plan that advises all employees on what's available, how to use the services and the etiquette necessary in a corporate setting.

Our employees use OneSAIC, a social computing environment that runs on Jive. Employees can earn points for participation and badge ratings for their expertise in the communities of interest. This drives use of the platform—to be seen as a knowledgeable employee is something of an informal currency that is valued by both leadership and peers alike. ▶▶▶



Robert Fecteau,
CIO, SAIC



John Swieringa,
SVP & CIO,
Dish Network



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We allow employees to tweet through Twitter and even retweet from the company Twitter account. It's important to allow access to Facebook, Instagram and Google accounts on employee desktops, since these tools are an integral part of their daily lives. Letting employees access their personal environments from the corporate network in a controlled way reduces work disruption and infuses a new level of interest in the corporate collaboration efforts.

JOHN SWIERINGA, DISH NETWORK

MAKE IT CONSUMER-LIKE

We have approximately 22,000 employees, and we know that individuals consume information differently. Yet because we're a large, vertically integrated company, most departments rely on the help of other departments to get their jobs done. The IT department takes an active role in boosting productivity by testing new collaboration tools. For instance, we began using Jabber in IT before rolling it out to employees. By evaluating the benefits and seeing how the tool functions within our organization, we can determine which tools will help with communication.

It's critical that team and department leaders use the tool—adoption will then scale up very rapidly. Once we deploy it, we let employees know the tool is available; with leadership participation, we only need to communicate the presence of a tool once to drive adoption. Delivering tools with intuitive, consumer-type experiences allows people to get up to speed quickly and can also boost participation.

It's important to ensure that people and skills are discoverable within the enterprise and also allow employees to stay informed about their interests and projects. By enhancing communication among offices spread across the country, collaboration tools help improve the overall work experience.

TRENT GAVAZZI, AVAILITY

CATER TO GENERATIONAL DIFFERENCES

As a midmarket company with dispersed teams of employees, we find that it's extremely important to facilitate real-time communication not only to help people get work done, but also to foster the social aspect of bringing people together. Many of our employees use tools like Twitter or Facebook as a matter of course, even more so than email, while other employees may need a training session when collaboration tools are deployed.

Different generations have differences in how they view collaboration tools; some share everything, while others want to control everything. Employees will not necessarily adopt tools in the same way, yet mandating their use will not work; forcing adoption goes against the sense of trust we are trying to encourage. Also, different groups of employees prefer different types of tools. Developers use Confluence for sharing project information and SharePoint, while other employees use Lync.

It works best to introduce a tool and tell employees about it, and if it's useful, it will go viral. This has happened with Yammer—I introduced it with little campaigning, and now two-thirds of employees use it regularly. Another strategy is to make sure a tool loads automatically every time employees log on to their computers.

TAKE Note

Marketing IT's Value

WATCH It's not easy to establish credibility outside of the technology organization and win the respect of business leaders. Many people still view IT as a service bureau rather than a strategic business partner. Winning greater respect requires a determination by IT leaders to promote and validate IT's value. In this online session, you'll hear from Jim DiMarzio, CIO of Mazda North America, and Scott Sacca, senior director and IT leader at J&J Diabetes Solutions Cos., about their efforts to communicate IT's business value. council.cio.com/mktvalue

Developing Your Bench

ASSESS To progress from service provider to true business partner, IT leaders must develop and apply key competencies such as adjusting their focus, enhancing staff expertise and elevating stakeholder relationships. Although the path can be strewn with obstacles, there are many rewards, such as delivering business value and ensuring the continued relevance of the IT profession in any business climate. CIOs can get started on this journey by using an online tool to assess and understand their leadership competencies and identify areas for further development and improvement. council.cio.com/benchstrength

Nurturing IT Talent

WATCH For too long, career development and talent management have taken a back seat in the corporate world—and in IT organizations in particular. Career discussions tend to be inconsistent, infrequent and reactive. Unfortunately, this situation has led IT organizations to lose highly valuable employees simply because these professionals did not know of opportunities that existed, let alone how to grow into these positions. This online session features Jim McDonald, a cloud architect at Hess, and Simon Dunning, vice president of IT at Applied Materials, who discuss retaining and developing talent today. council.cio.com/curve

Educational Innovation

At Kaplan, IT untethers from old approaches and focuses on keeping up with fast-changing student needs **BY EDWARD HANAPOLE**

Our mission is to be as student-centered as possible. To do that, we have to break out of our old mode of operating and adopt new technologies at the same pace that they're being introduced into the marketplace.

Companies that are just forming today can make very different decisions than they would have 10 years ago because they don't have the baggage of an enterprise IT solution. So the question becomes how to enable that kind of agility without destroying the existing technology base and revenue stream.

The philosophy I've taken over the past three years focuses on analyzing how students and consumers use technology in their personal lives and then giving our nearly 30,000 employees those same levels of capability. We made the strategic decision to adopt Google applications and move as much as we could to cloud-based systems, including KAPx, an educational delivery platform we built entirely in the cloud. This frees us to focus more on the student experience; plus, our employees can better understand how students are experiencing technology in the real world and how technology disruption is occurring across the entire education life cycle.

At the same time, we couldn't just ignore issues like security and business support systems. The question became how to organize the technology team so that the two sides—the startup mentality and the legacy orientation—weren't pitted against each other. We organized IT to have two distinct personalities and missions. Most of the infrastructure and business systems team is centralized under our core technology division, and a separate innovation team was created to focus on technology disruption and new business opportunities.

With this structure, we've developed specific handoffs

to move new capabilities from the innovation and growth quadrant down into the mature, business-as-usual quadrant. As new approaches get accepted, they work their way into the system and push the old ways out.

We also started an incubator program that looks at how education might change further out on the horizon—like intelligent agents providing students with the information they need at exactly the right time, or incorporating

instructional design and cognitive science methods to help students learn more efficiently. Technologies like 3D printing and robotics will affect how students learn mathematical concepts, for instance. They'll be able to see how a math formula would be useful—how it would make something move in the physical world.

All of this is helping to untether the enterprise from the old approaches of the past. It used to be mobile that was the big thing; now that's commonplace and has been replaced by wearables as the topic of interest. To

stay relevant, you need to establish a technology function that is rooted in what's going on outside of the enterprise. And if you don't give them the ability to be creative with that technology inside the enterprise, you'll never get there.

It's not just agile thinking about technology but also agile thinking about the business and staying closely tuned into fast-changing student needs.



Edward Hanapole is CIO at Kaplan Inc., a for-profit education company. He is a member of the CIO Executive Council.



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Sound Advice, Fueled by IT

For Mark Casady, CEO of LPL Financial, IT is essential to adviser efficiency and the best customer experience **BY MARTHA HELLER**

How is technology changing LPL as a business?

Technology is affecting LPL in terms of efficiency, transparency and consumer expectations. We are replacing key technologies, including document management, performance reporting, a portfolio rebalancing tool and cashiering technologies, to help our employees operate more efficiently.

What is one technology that you are particularly proud of?

We have a network of more than 14,000 independent advisers—and tens of thousands more licensed staff—who need information about processing a form, setting up a 529 [account] or learning the tax implications of passing an IRA from one generation to another. Years ago, we created The Resource Center, where

in the moment an employee thinks, “I could make this process better.”

We just put in Spigit, which provides a systematic way for employees to submit ideas for process improvement, new client offerings and other business enhancements. We are using technology to institutionalize an innovation process and then funding good ideas and telling success stories about them.

Our CIO, Victor Fetter, started “Innovation Days,” which allows members of the IT organization to join an innovation team and develop an idea over the course of a day. A committee selects a set of those ideas, asks the team to price them, and then funds the best. We might start with 50 ideas, refine them to 20, and then fund six. These are “in the moment” projects, not massive multimillion-dollar builds.



Our CIO needs to get up on a main stage and win the hearts and minds of our employees.

Our new mobile AccountView gives our clients—financial advisers—account information anywhere, at any time. Before, our clients were limited to a digital copy of customer statements; now, they can see accounts and asset allocations in a more sophisticated way. We have also put in an Internet-based phone system, which allows us to better monitor and analyze call trends from the millions of calls we receive to improve service quality.

Our goal is to provide advisers with technology that enables customers to manage their financial lives similarly to how they manage their personal lives.

our advisers could access all that information. We completely overhauled that tool by redesigning the user interface and putting in a smart, robust search engine. We’ve also eliminated 80 percent of the content, so that the site provides only information that is current and relevant.

One of our advisers described the old resource center as “the New York City white pages unalphabetized.” I thought, “That’s funny, but it’s sad.” Now, our advisers praise the tool.

How do you create a culture of innovation at LPL?

The best innovation does not happen when you’re taking a shower or driving to work. Innovation occurs

What skills do you value in your CIO?

I value the depth of Victor’s mobility knowledge, but I also value his leadership skills and ability to hold the IT team accountable for delivery dates, quality and investment decisions. Our CIO needs to get up on a main stage and win the hearts and minds of our employees and advisers. Victor is active on social media, so I was able to see YouTube videos of his presentations. I knew he was our next CIO before I even met him.

Martha Heller is president of executive recruiting firm Heller Search Associates and author of *The CIO Paradox*. Follow her on Twitter: @marthaheller.

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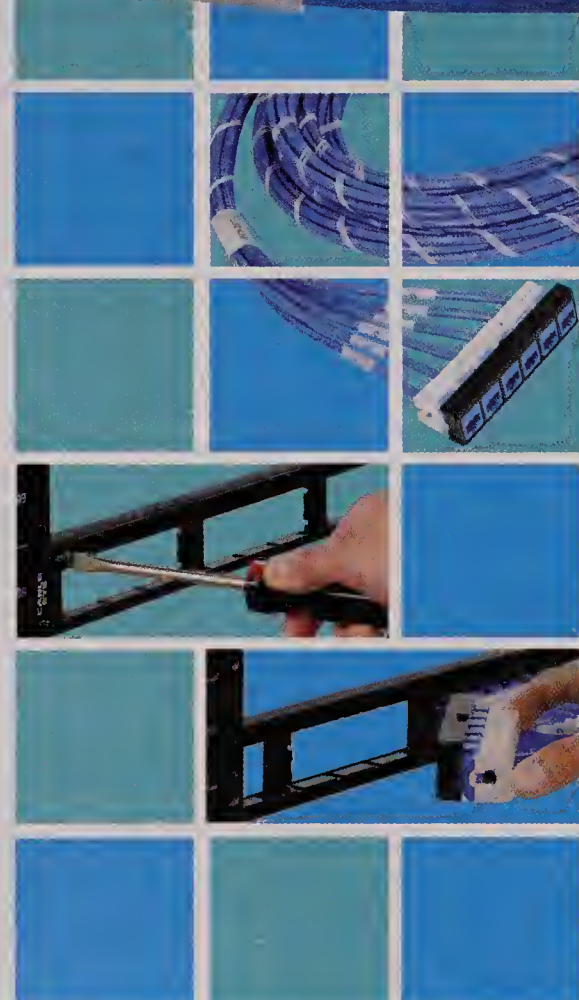
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Say **Yes** to the **App**

The excitement of getting engaged is often followed by pressure to find the perfect dress for the big day. From the many shades of white to the wide variety of styles, choices abound. A new iPad app called Wedding Dress Studio could make things easier. It provides a cheat sheet of dress designs to try on virtually before hitting the boutiques. "It's an expensive purchase you make once in a lifetime," says Hillary Sica, a spokeswoman for the app's creator, Wedding Reality. "There are so many options, and most people are going into it blindly." To start searching for her dream gown, a bride-to-be uploads a full body photo to the app. She then taps the edge of each shoulder and hip so the app can detect the size and shape of her body. From there, she can experiment with 300 combinations of silhouettes, necklines, colors and embellishments. She can save photos of herself in, say, a strapless mermaid dress or a satin ballgown in the app or on a mobile device, to browse later or share on social media. Next up: The company plans to add bridesmaid and mother-of-the-bride dresses.

—Lauren Brousell

Why You Should Care About Mobile and BYOD

Market
Pulse



Enterprises that design and implement effective mobile strategies, including bring-your-own-device (BYOD) programs, are realizing competitive advantages. These benefits can extend throughout the business value chain, spanning marketing, sales, customer service, operations and IT.

In spite of the benefits, not all organizations are making the move to mobility or BYOD. In a new IDG Research Services survey conducted in September 2014, respondents report a number of challenges to the development and implementation of a mobile strategy, including difficulty in measuring return on investment (ROI), concerns about mobile device security and the vulnerabilities of networks accessed by mobile devices.

However, the benefits of mobile implementations and well-developed BYOD policies outweigh perceived barriers for the bulk of survey respondents. What's more, concerns such as security are surmountable, often depending on the vendors with which organizations partner. Returns on BYOD investment cited by the respondents include:

- Higher worker satisfaction and productivity
- Greater collaboration and customer service
- Lower costs
- Better endpoint security
- More efficient operations
- Improvements in billing cycles

Allowing employees to use their own devices can reduce hardware, support and carrier costs. Employees who use

their own devices are more productive because they use them outside the office for work as well.

Given the many benefits of mobile technology in the enterprise, it's not surprising that the IDG survey of more than 100 mobile purchasing decision makers shows budgets for enterprise mobility solutions will increase over the next year by an average of nearly 7 percent. Larger enterprises are even more committed to mobile spending, the survey shows, with 64 percent of respondents from enterprises with 10,000 or more employees expecting an average increase of 17 percent in their mobile budgets.

As respondents consider the solutions and vendors on which they will spend this additional budget, they desire a number of capabilities. Security, by far, is the top priority in evaluating enterprise mobility vendors, according to respondents. In fact, five of the top seven priorities in choosing mobility vendors involve security issues, including whether the vendor provides secure access controls and endpoint encryption. The second-highest mobile vendor capability is support for business applications such as email, calendar and contacts — all enablers of productivity, which supports the success of the organization.

The survey suggests that enterprises of all sizes prefer to partner with enterprise mobility vendors that provide comprehensive capabilities. These capabilities include not only effectively protecting devices, data and networks, but also enabling users and the overall organization to achieve greater productivity, agility and ROI.

Although mobility and BYOD can create additional risk, this survey shows that a deliberate and thoughtful mobile strategy can yield exceptional benefits while maintaining security. Organizations without a clear mobile strategy and solid execution risk falling behind the ones that are embracing it. For a more in-depth discussion about mobility, including details on the survey and its results, **click here:** www.cio.com/whitepapers/dell_emm.



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